

NC eProcurement

Inventory Items

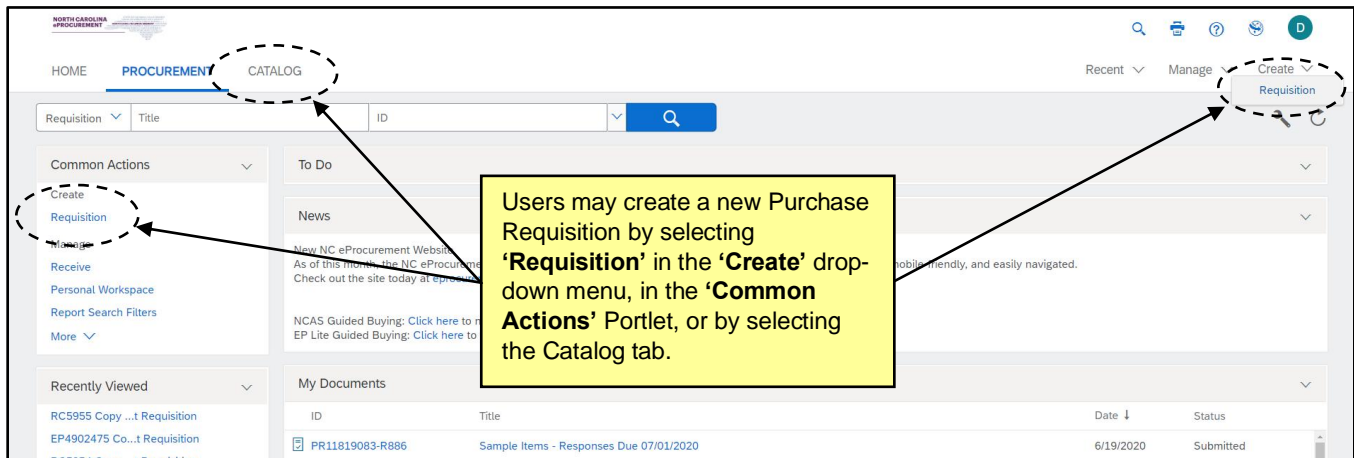
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COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASER
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
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DHHS and DPS users in the '**NCAS Warehouse Purchaser**' group can track inventory purchases using the '**Item ID**' and '**Warehouse ID**' fields in NC eProcurement. Purchases using these fields will be transmitted to NCAS and will update the *on-order* inventory level within the NCAS inventory module.

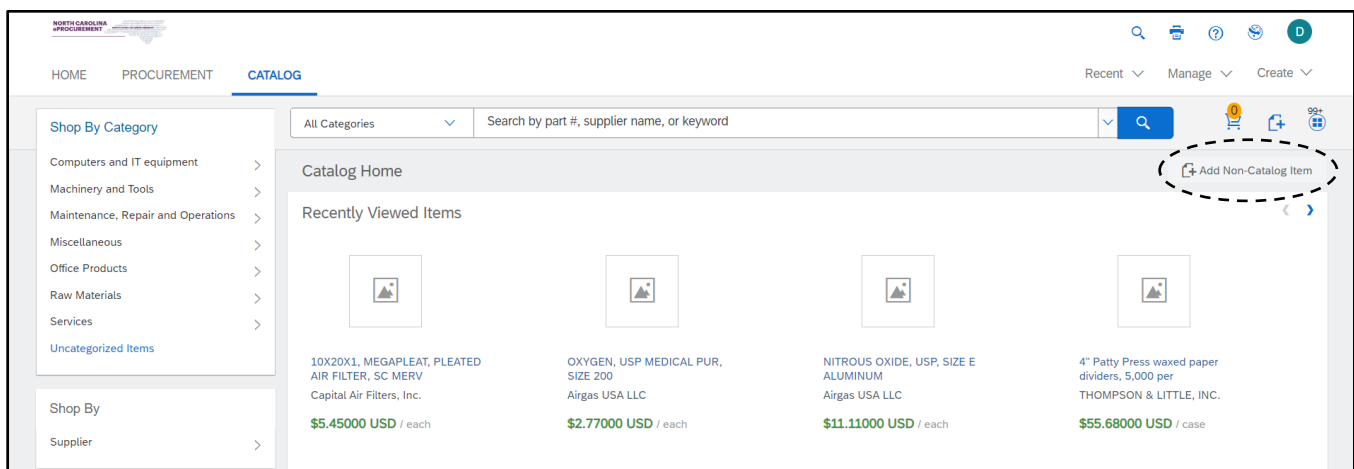
Once the goods are physically received, and a receipt is entered into NC eProcurement and processed through NCAS, the *on-hand* inventory level within NCAS will be updated.

I. Inventory Items in Expert View

1. From the NC eProcurement Procurement tab, click '**Requisition**' from the '**Create**' Shortcut Menu on the Menu Bar the '**Common Actions**' Portlet, or select the Catalog tab, to start creating the Purchase Requisition (PR).



2. Click the '**Add Non-Catalog Item**' button to enter non-catalog information.



3. Add an '**Item ID**' and a '**Warehouse ID**' to the line item by using the drop-down arrows and selecting '**Search more.**'

Note: The '**Warehouse ID**' field values will be scoped based on the selected '**Item ID**'.

Create Non-Catalog Item

Full Description: * Sample Inventory Item

Conversion Factor: 1

Contract Type: No Choice

Bid Number: (no value)

Payment Basis: * Receipt

Blanket Purchase Order? ☐ Yes ☒ No

Item ID: (no value)

Warehouse ID: (no value)

Stock Keeping Unit:

FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor f

Recycled Content Indicator: ☐ Yes ☒ No

SKU Quantity: 1

Update Amount

Supplier Information

Supplier: (No Preference)

4. The following fields will automatically populate based on the selected '**Item ID**' and '**Warehouse ID**' values.
 - a. **Stock Keeping Unit** - Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.
 - b. **Company** – Once populated, this field is editable by the user.

Note: If the Company, Account, or Cost Center is set as a default value in the user's profile, the inventory item will not overwrite the user's chosen preferences. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default value set in their profile, the selection of the inventory item will default the appropriate NCAS values.

- c. **Account** – Once populated, this field is editable by the user.
- d. **Cost Center** – Once populated, this field is editable by the user.

Note: If a user has manually entered a value in any of the above fields before the '**Item ID**' has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

5. The following fields will need to be populated with the correct information to match the **Item ID** field.

- Full Description** – a detailed explanation of the item.
- Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.
- Price** – the cost based on Unit of Measure.
- Unit of Measure** – the selected **Unit of Measure** must match the Stock Keeping Unit associated with the inventory **Item ID**.
- SKU Quantity** – This field is equal to the **Conversion Factor** multiplied by the **Quantity**. This field is not editable.

Example: The SKU for an **Item ID** is 'each,' but the **Unit of Measure** on a catalog line item is 'box.' The **Conversion Factor** would be the number of items in the box.

- Select a '**Supplier**' using the drop-down menu if necessary. If the desired supplier is not displayed in the previous choices, click '**Search for more...**' to select the appropriate supplier.
- The '**Location**' field automatically populates when a Supplier is selected. To change the default Location, click the '**Select**' link to the right of the field.
- Adjust the quantity in the '**Quantity**' field if necessary.

Note: The '**Item ID**,' '**Warehouse ID**,' '**Stock Keeping Unit**,' '**Conversion Factor**,' and '**SKU Quantity**' fields are not editable via the Mass Edit process.

Note: Shipping/Freight charges should be included as a separate line item on the PR using the freight commodity code, '**781018 – Road cargo transport**.' This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

Choose Value for Item ID

Found more than 500 items. The results shown here include unique items from the first 500 items found.

Name

ID	Name	Description	ItemUoM	Commodity Code	Default Cost	Company	Cost Center	Account	
190001857	0001857	PRISON CELL BLOCK LOCKS, HEAVY DUTY, KEYED BOTH SIDES. FOLDGER-ADAMS' CAT. #86.	EA	450-55	\$129.55000 USD	1901	11301116	533800014	<input type="button" value="Select"/>
190001860	0001860	DIETETIC GREEN BEANS, 6#10 CANS/CASE	CS	393-47	\$15.37000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001861	0001861	DIETETIC CARROTS, 6#10 CANS/CASE	CS	393-47	\$13.93060 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001862	0001862	DIETETIC BEETS, 6#10 CANS/CASE	CS	393-47	\$20.67000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001863	0001863	THERAPEUTIC GREEN PEAS, 6#10 CANS/CASE	CS	393-86	\$0.00000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001864	0001864	TOMATOES, LOW SODIUM, 24#303 CANS/CASE	CS	393-86	\$11.41540 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001865	0001865	GRAPEFRUIT JUICE, UNSWEETENED, 12/46 OZ CANS/CASE. QUALITY GRADE TO BE FANCY. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED.	CS	393-60	\$0.03670 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001866	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE GRADE A. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
190001867	0001867	APPLE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE GRADE A. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
190001868	0001868	V-8 JUICE, LOW SODIUM, 48/5-1/2 OZ CANS/CASE. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
		CRANBERRY COCKTAIL JUICE, 12/46 OZ CANS/CASE QUALITY							

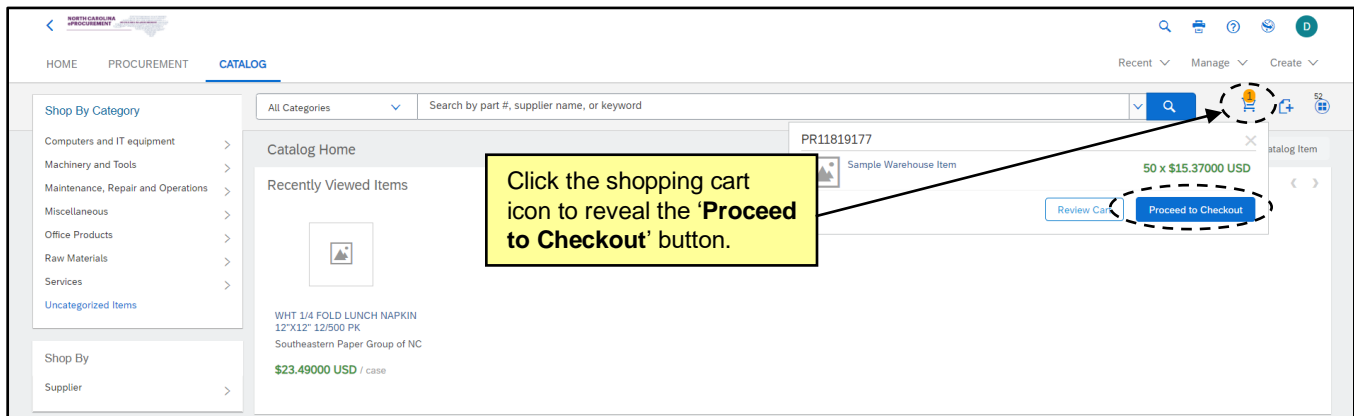
Information from the 'Item ID' selection screen can be used to populate the line item.

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6. Click **'Add to Cart'** to go back to the Catalog.
7. Add additional line items to the cart if needed, then click **'Proceed to Checkout'** to reach the PR Summary page,

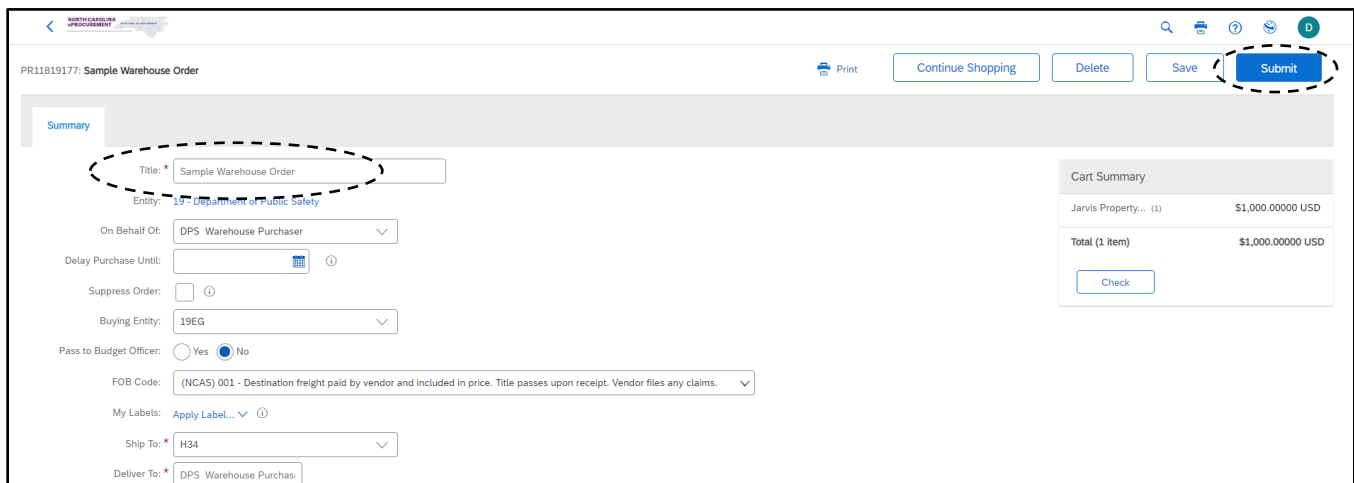
Note: Select the shopping cart icon to display all line items currently in the cart, and to reveal the **'Proceed to Checkout'** button.



8. On the Summary page, add a Title to the PR.

Note: To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate PRs.

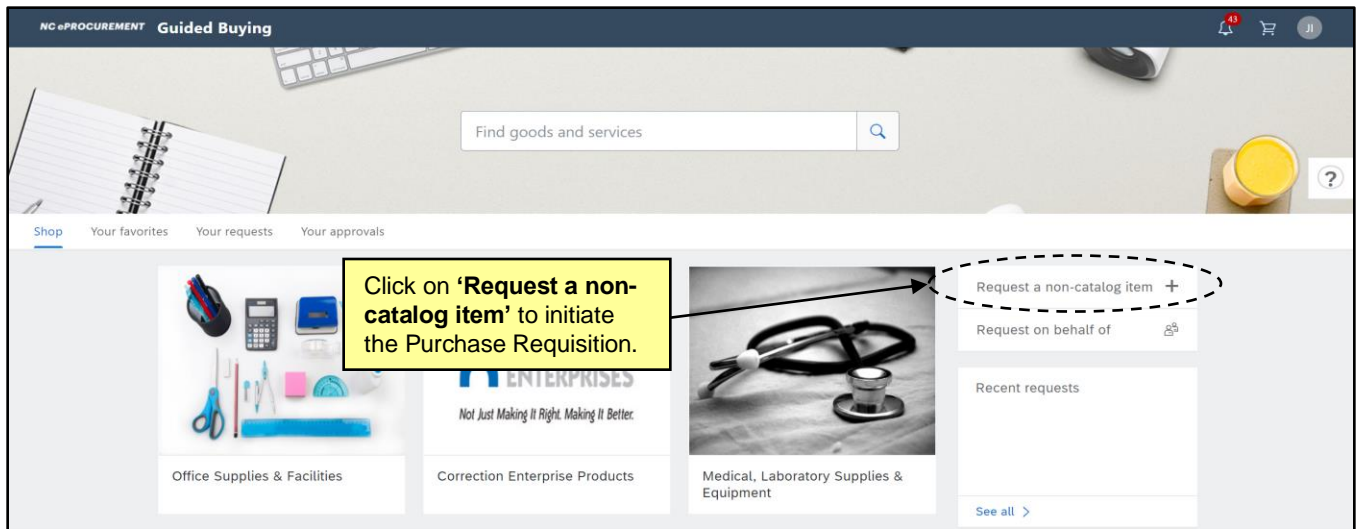
9. After reviewing the PR details for any incorrect information, click **'Submit.'**



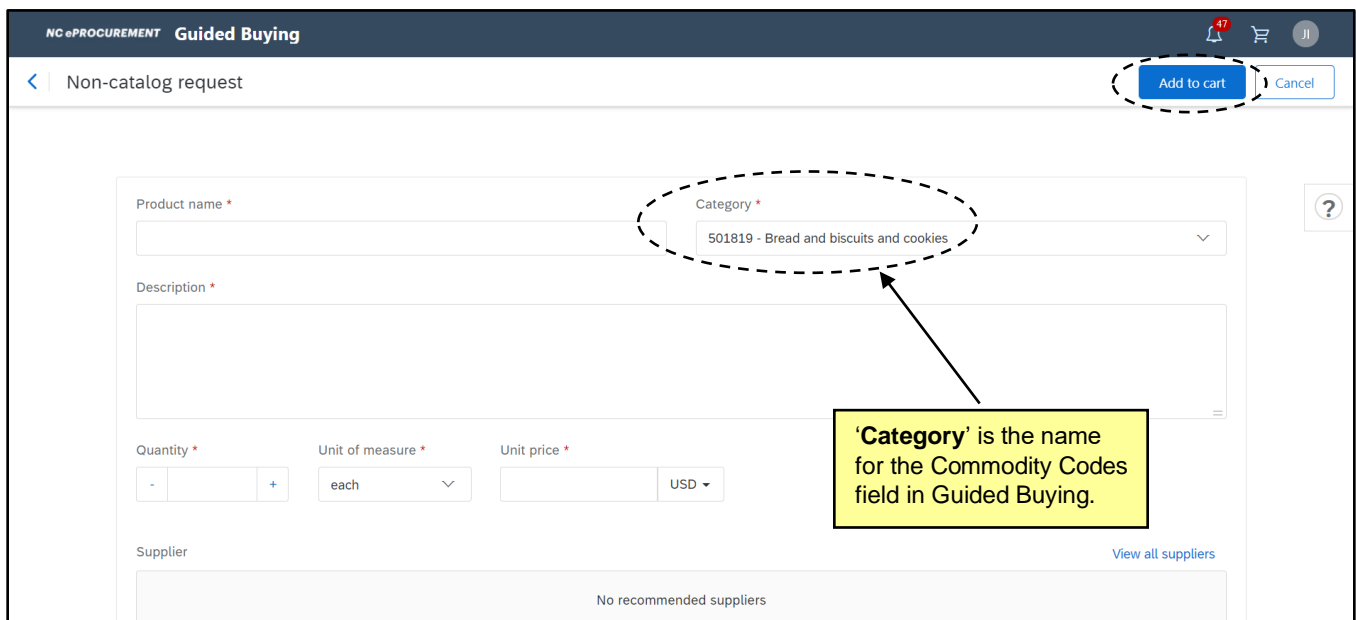
II. Inventory Items in Guided Buying

Inventory items may also be created in Guided Buying. Purchase Requisitions (PRs) created in either view will be visible in both views.

1. From the Guided Buying landing page, click **'Request a non-catalog item.'**



2. On the Non-catalog request page, add in the required line item details.
3. Click **'Add to cart'** to add this line item to the shopping cart in Guided Buying.



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- To add more items to your cart before checking out, use the back arrow to go to the Guided Buying landing page and continue shopping. Click **'Check out'** to go to the Summary page.

The screenshot shows the 'NC ePROCUREMENT Guided Buying' interface. The main section is titled 'Non-catalog request'. It contains a form with the following details:

- Product name:** Sample Warehouse Item
- Category:** 501819 - Bread
- Description:** Sample warehouse item description
- Quantity:** 400
- Unit of measure:** each
- Unit price:** \$5.00 USD

Overlaid on the right is a cart summary box titled 'You have 1 item in your cart'. It shows:

- Item:** Sample Warehouse Item
- Description:** Sample warehouse item description
- Price:** \$5.00000 USD
- Quantity:** 400
- Total:** \$2,000.00000 USD
- Buttons:** 'Delete' and 'Check out' (circled with a dashed line).

- On the Summary page, click the arrows to expand sections and access more fields.

The screenshot shows the 'NC ePROCUREMENT Guided Buying' Summary page. The page title is 'Sample Warehouse Item' with a breadcrumb 'Checkout / PR11819263'. There are buttons for 'Send request' and 'Save and exit'.

The main content area is divided into sections:

- Ship to:** NC DEPARTMENT OF PUBLIC SAFETY, Jacksonville, NC 28540-0370, United States.
- Charge to:** Company (1901).
- Total Cost:** \$2,000.00000 USD.
- Net Amount:** \$2,000.00000 USD.

Below these is a section titled 'Items (1)' containing a table with one item:

Item	Quantity	Price	Net Amount
Sample Warehouse Item North Carolina Department of Public Safety	400	5 USD	\$2,000.00000 USD

Annotations on the screenshot include:

- A dashed circle around the 'Show advanced options' link.
- A dashed circle around a checkbox in the 'Items (1)' section.
- A yellow box with the text: 'Use the arrows on the Summary page to expand different sections and see more detailed information.'

- After expanding the sections for the inventory line item, scroll down to the **'Others'** section and expand it to see the **'Item ID'** and **'Warehouse ID'** fields.

7. Click the drop-down arrow and use '**Browse all**' to add values to each field.

Note: The '**Warehouse ID**' field values will be scoped based on the selected '**Item ID**.'

The screenshot shows the 'NC ePROCUREMENT Guided Buying' interface. The top navigation bar includes 'Sample Warehouse Item' and 'Checkout / PR11819263'. The total cost is '\$2,000.00000 USD'. The main content area is divided into sections: Accounting (Company (1901)), Shipping (NC DEPARTMENT OF PUBLIC SAFETY, Jacksonville), Comments, Attachments, and Others. The 'Others' section is expanded, showing fields for Terms of Payment (N30), Contract (no value), Contract Type (No Choice), Payment Basis (Receipt), Item ID (no value), Stock Keeping Unit (Not specified), Recycled Content Indicator (No), Commodity Code (501819 - Bread and biscuits and cookies), Conversion Factor (1), Bid Number (no value), Blanket Purchase Order? (No), Warehouse ID (no value), FOB Code (NCAS) 001 - Destination freight paid ..., and SKU Quantity (400). The 'Item ID' and 'Warehouse ID' fields are highlighted with dashed circles.

8. The following fields will automatically populate based on the selected '**Item ID**' and '**Warehouse ID**' values.

- Stock Keeping Unit** - Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.
- Company** – Once populated, this field is editable by the user.

Note: If the Company, Account, or Cost Center is set as a default value in the user's profile, the inventory item will not overwrite the user's chosen preferences. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default value set in their profile, the selection of the inventory item will default the appropriate NCAS values.

- Account** – Once populated, this field is editable by the user.
- Cost Center** – Once populated, this field is editable by the user.

Note: If a user has manually entered a value in any of the above fields before the '**Item ID**' has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

9. The following fields will need to be populated on the line with the correct information to match the **Item ID** by expanding each section as needed.

- Full Description** – a detailed explanation of the item.
- Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.
- Price** – the cost based on Unit of Measure.
- Unit of Measure** – the selected **Unit of Measure** must match the Stock Keeping Unit associated with the inventory **Item ID**.
- SKU Quantity** – This field is equal to the **Conversion Factor** multiplied by the **Quantity**. This field is not editable.

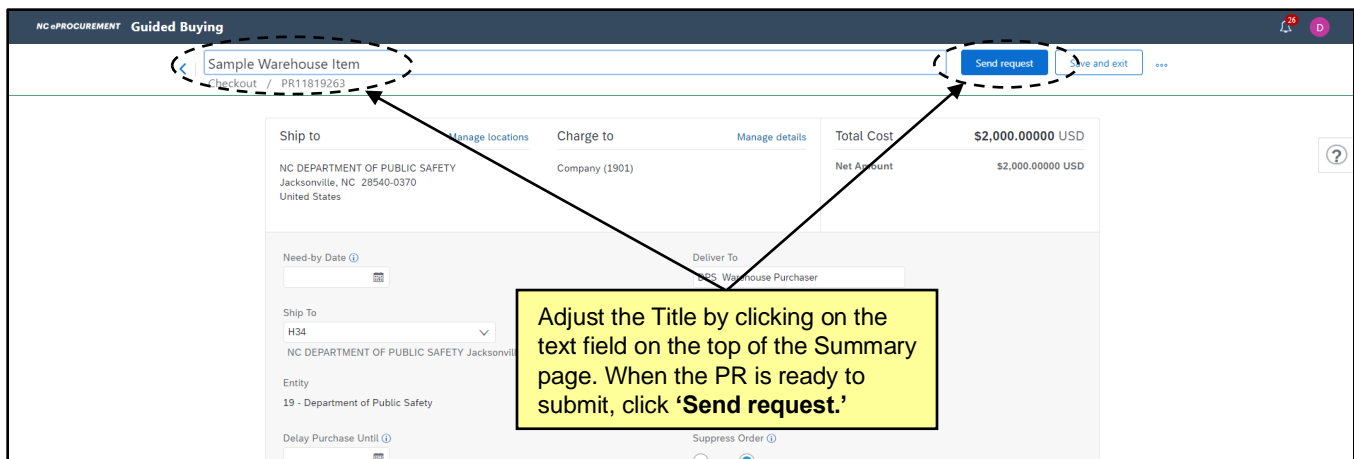
Example: The SKU for an **Item ID** is 'each,' but the **Unit of Measure** on a catalog line item is 'box.' The **Conversion Factor** would be the number of items in the box.

- Select a '**Supplier**' using the drop-down menu if necessary. Use the drop-down menu and click '**Browse all**' to select the appropriate supplier.
- The '**Location**' field automatically populates when a Supplier is selected. To change the default Location, click the '**Browse all**' link in the drop-down menu for Location.
- Adjust the quantity in the '**Quantity**' field if necessary.

Note: Shipping/Freight charges should be included as a separate line item on the PR using the freight commodity code, '**781018 – Road cargo transport.**' This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

10. Adjust the Title of the Summary page if necessary by clicking on the field and entering a new title. After reviewing the PR details for any other incorrect information, click '**Send request.**'

Note: To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate PRs.



The screenshot displays the 'NC ePROCUREMENT Guided Buying' interface. At the top, the title 'Sample Warehouse Item' is shown next to a 'Checkout / PR11819263' link. To the right of the title are buttons for 'Send request', 'Save and exit', and a menu icon. Below the title, the 'Ship to' section shows 'NC DEPARTMENT OF PUBLIC SAFETY Jacksonville, NC 28540-0370 United States'. The 'Charge to' section shows 'Company (1901)'. The 'Total Cost' is '\$2,000.00000 USD' and the 'Net Amount' is '\$2,000.00000 USD'. A yellow callout box with a black border contains the text: 'Adjust the Title by clicking on the text field on the top of the Summary page. When the PR is ready to submit, click 'Send request.''. Arrows point from this box to the title field and the 'Send request' button.

III. Change Orders for Inventory Items in Expert View

Change orders can be created to decrease the quantity of Inventory Items.

Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCAS. A new Purchase Requisition (PR) should be created if additional Inventory Items are required.

1. Search for the PR and click the **'Change'** button to initiate a Change Order.

The screenshot shows the 'PR11816772 - Cans of Tomatoes' page. At the top, there are buttons: Copy, Change, Cancel, Receive, and Print. The 'Change' button is circled in red, and a yellow callout box points to it with the text 'Click the 'Change' button.' Below the buttons, there are tabs: Summary, Collaboration, Orders, Receipts, and History. The 'Summary' tab is selected. On the right, there is a 'Cart Summary' table.

Cart Summary	
US Foods (1)	\$5,495.00000 USD
Total (1 item)	\$5,495.00000 USD

2. The quantity can be decreased directly from the **'Summary'** page or by clicking the **'Edit Details'** link in the Actions drop-down.

Note: Receiving and invoicing status rules still apply. Please see the **'Receiving'** job aid for details.

The screenshot shows the 'Line Items' page. At the top, there is a '1 Item Total' section. Below it, there is a table with columns: No., Type, Description, Qty, Unit, Price, Discount, Net Amount, Charges, Taxes, and Amount. The first row is highlighted, showing '1' in the 'No.' column, 'TOMATOES, LOW SODIUM, 24/#303 CANS/CASE' in the 'Description' column, and '500' in the 'Qty' column. A yellow callout box points to the 'Qty' field with the text 'Decrease the Quantity directly on the Summary page.' Below the table, there are buttons: Actions, More, Import Accounting, and Update Total. The 'Actions' button is circled in red, and a yellow callout box points to it with the text 'Click 'Edit Details' to see all line item fields.' Below the 'Actions' button, there is a dropdown menu with options: Copy Selected Lines, Edit Details, Edit Charges, Edit Taxes, Delete Selected Lines, Delete Discounts, Delete Charges, and Delete Taxes. The 'Edit Details' option is selected.

3. Click **'Submit.'**

IV. Change Orders for Inventory Items in Guided Buying

Change orders can be created to decrease the quantity of Inventory Items. Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCAS. A new Purchase Requisition (PR) should be created if additional Inventory Items are required.

Note: There is no system search in Guided Buying. If a Change needs to be made for a PR created by another requester, then first navigate to Expert View and use the search options available in that view.

1. Find or search for the PR on the **'Your Requests'** tab and click the **'Change request'** button.

The screenshot shows the 'Cans of Tomatoes' request details page. At the top right, there are buttons for 'Change request' and 'Cancel request'. A yellow callout box with the text 'Click the 'Change request' button.' points to the 'Change request' button. Below the buttons, the 'Ordered' status is shown. The 'Ship to' section lists 'NC DEPARTMENT OF PUBLIC SAFETY, Jacksonville, NC 28540-0370, United States'. The 'Charge to' section lists 'Company (1901)'. The 'Total Cost' is \$5,495.00000 USD. Below this, the 'US Foods' section shows a list of items. The first item is 'TOMATOES, LOW SODIUM, 24/#303 CANS/CASE' with a quantity of 500, a price of \$10.99000 USD, and a net amount of \$5,495.00000 USD. The 'Unit of Measure' is 'case'.

2. The quantity can be decreased directly from the **'Summary'** page. Other fields may be edited by expanding each section as needed

Note: Receiving and invoicing status rules still apply. Please see the **'Receiving'** job aid for details.

The screenshot shows the 'Cans of Tomatoes' request summary page. At the top right, there are buttons for 'Send request' and 'Save and exit'. A yellow callout box with the text 'Use the arrows next to each section to expand them as necessary.' points to the expand/collapse arrows next to the 'Items' section. Another yellow callout box with the text 'Edit the Quantity directly on the PR Summary page.' points to the quantity field in the item list. The 'Items' section is expanded, showing a list of items. The first item is 'TOMATOES, LOW SODIUM, 24/#303 CANS/CASE' with a quantity of 500, a price of \$10.99000 USD, and a net amount of \$5,495.00000 USD. The 'Unit of Measure' is 'case'.

3. Click **'Send Request.'**